From: Rellen Hayes
To: Tucker-Potter, Stacy
Subject: Directory Project - Client Site
Date: Monday, September 09, 2019 1:31:58 PM

Hello Stacy,

I'm happy to introduce to you the Client Site, where you can do the following:

- Access and modify your constituent records live in our database
- Send a customized link to a constituent where they can update online
- Easily download data returns and NCOA address changes

The "Search Constituents" feature of the site will allow you to remove anyone from active marketing (i.e., check "Do Not Phone", "Do Not Mail" and "Do Not Email") as well as edit the biographical data. All changes you make update live in the PCI database.
"Search Constituents" also gives you access to an online update site link customized to each individual constituent. Just search for the constituent by name or id #. The search results will populate below the search fields. Click the "Copy" button to the right of that person's name and paste it into an email for sending. As a precaution, always test the link before sending to make sure it takes the recipient to the correct record.

The **"Manage Files"** feature of the site will allow you to download Data Returns. Please note that the NCOA file we received back from the USPS is now posted and ready for you to download. You will find the NCOA Excel file lists **1,525** address corrections that you can use to update your constituent records now. These address corrections will not be included in the data returns.
To access the Client Site, please go to:
https://clientupdate.publishingconcepts.com/truman/
You will need to key in a UserID and password. The UserID is: Truman
I will give you the password separately for security reasons.
Please note that this site has been optimized for Chrome and Firefox browsers, or IE 8 and above.
If you have any questions, please call me at 972-728-3687. I'd be happy to walk you through using the site.
Best,

Rellen

Rellen Hayes
Publishing Concepts | Project Manager
Proud PCI Associate since 2014

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Back-to-Back Winner! For two years in a row PCI has been named the "#1 Best Place to Work" in the state of Texas (The Texas Association of Business and the publishers of *Texas Monthly*) and in Dallas-Fort Worth (*Dallas Morning News*). Research shows that a highly engaged workforce drives higher overall client satisfaction.

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